

**LOWELL COMMUNITY
DEVELOPMENT CORPORATION
STRATEGIC PLAN
2016-2019**

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**Lowell Community Development Corporation
Strategic Plan**

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Lowell Community Development Corporation Strategic Plan

INTRODUCTION

This strategic plan (“Plan”) is the result of six months of ongoing effort by the Board of Directors and Strategic Planning Committee of the Lowell Community Development Corporation (“Lowell CDC”). As a growing organization, planning is a critical component of forming the future and gaining clarity around the ways the organization might achieve that future.

To that end, this Plan is presented and will be used as a living document, to be updated as situations and circumstances change. It should be noted that as the first plan for this organization, it is fundamentally fraught with the tension between the need of the organization to build and strengthen its own infrastructure, and the desire to meet the needs of the community.

The Board of Directors and Staff of the Lowell CDC developed this Plan with assistance from TDA Consulting. It provides the Lowell CDC with a three-year roadmap for supports, programs and organization development. The Board of Directors and staff will review progress quarterly and will review and update the plan annually as needed.

This plan was developed with broad involvement and guidance from the Board of Directors and staff. The Strategic Planning Committee included **seven** board members and the Executive Director of the Lowell CDC. This Committee met over a period of months to reflect on the mission, vision, core operating values and assumptions underlying the organization’s approach to its work. These meetings set the stage for a work session during which the organization’s strategic direction was defined. It is important to note that at each stage the information developed was brought back to the full Board of Directors, and benefitted from their ongoing input. The staff helped coordinate the planning process and provided important support and analysis to complete this plan. TDA Consulting facilitated the planning process, including an environmental scan. The environmental scan and organizational assessment helped Lowell CDC assess both the challenges and opportunities it is likely to face over the next three years and set the context for the choices reflected in this Plan.

EXECUTIVE SUMMARY

Background and History

The Lowell CDC was formed as a 501(c)(3) nonprofit public benefit corporation under California law in 2011. Recognizing the opportunity to have a positive impact on their community, the founding Board members came together to “ensure equitable and affordable housing options for low and moderate income people, and community improvement opportunities for all residents of the Lowell community.” To do so, the original Articles of Incorporation say that the organization will:

- Facilitate the development, rehabilitation, preservation and management of the housing stock located primarily within the boundaries of the Lowell neighborhood
- Provide advocacy and structure to organize and connect the additional resources necessary to enable stabilization resulting in a regeneration and improved quality of life for an economically diverse and family oriented neighborhood.

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The Lowell CDC has experienced tremendous growth since its inception. This organization has helped to develop the "Lowell Model," a comprehensive approach to the revitalization of inner-city neighborhoods throughout the City of Fresno. The Lowell CDC's role in this model has resulted in 6 new homeowners (1 new construction project and 5 rehab projects), 30 new planned units of affordable housing, improved management systems, and the development of a strategy to hold all property owners and tenants accountable for making positive contributions to the quality of life in the neighborhood through our Fresno Rent Right Program. The Lowell CDC is participating with the City of Fresno, the Fresno Housing Authority and other local agencies to build the capacity of the local CDCs through collaboration and sharing of best practices.

Strategic Direction

As a young and growing organization, the Lowell Development Corporation has determined that it will focus on areas that will support its dual goals of increasing its organizational capacity and meeting the needs of the Lowell neighborhood.

The strategic direction and goals included in this plan are a response to its understanding of the critical needs of the community, and current opportunities and challenges for offering a strategic and coordinated response that will increase the quality of life and opportunities for those living in Lowell. The three-year period of this Plan will be a time of assessing and building the Lowell CDC's capacity to meet these needs. Concurrently, the Lowell CDC will continue to increase its visibility in the community, assuming a leadership role in working with a broader array of community resources, and will explore opportunities to collaborate with community partners. These efforts are summarized by the following strategic direction:

1. The Lowell CDC will deepen its relationships with its community through outreach and a creation of neighborhood networks that increase participation across the diverse communities within Lowell.
2. The Lowell CDC will review and deepen its relationships with existing and potential partners, identifying areas of alignment and opportunities to work together to meet residents' needs.
3. The Lowell CDC will continue to work to increase the capacity of the organization, with a specific focus on staffing and financial support for human capital needs.

Organization of the Plan

As noted above, this Plan is intended to be a management tool for the Lowell CDC. This plan has two purposes. First, it presents the most comprehensive compilation of the plan and its component parts. It is a record of the planning process and the decisions reached by the Board of Directors. Second, it is a reference guide for planning. At the beginning of each section a box includes a definition of the component part. In the future the Lowell CDC may choose to produce a summary version of the plan for distribution to its primary and supporting partners and other stakeholders.

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VISION

The Lowell CDC will lead the creation of a safe, diverse, family-oriented community that is a community of choice in Fresno, and an example of neighbors together solving problems and leveraging equitable practices to create housing, services and industry that supports that vision.

The vision statement describes the organization in the somewhat distant future—it is your dream, with a deadline.

Components of the vision statement may include: 1) How big is the reach or scope of the work? 2) What is the organization doing? What is its role? 3) What does the organization itself look like? 4) Who are biggest partners? 5) What are the major sources of funding? It may also include major external context or assumptions that will influence this vision.

The idea is to push the thinking out far enough that it is not tightly constrained by the current environment and capacities.

The 20-Year Vision for the Lowell CDC. In the year 2040, the Lowell CDC has been a leader in creating a diverse, unified community that is a model for transformation and a community of choice for all Fresno families. Lowell is a diverse and desirable family neighborhood with equitable affordable housing options for its members, who engage each other and solve local problems together. As a close-in downtown neighborhood, the area is an incubator for small businesses, with corridors of storefronts serving the surrounding residential community, and safe open public spaces where the community gathers and children play.

In addition to creating a neighborhood of choice, Lowell is a provides a roadmap and model for other parts of the community that are working to create strong neighborhoods.

While being a neighborhood of choice within Fresno, Lowell has worked hard to remain accessible to its diverse residents, with housing and services that meet the needs and desires of its economically and ethnically diverse population.

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MISSION

The mission of the Lowell CDC is to improve the quality of life in the Lowell neighborhood through community engagement, equitable housing and historic diversity.

An organization's mission statement is an opportunity to convey in a concise and compelling way the difference the organization is aiming to make in the world. It summarizes the What, How and Why of your organization's work. Stakeholders want to be part of making this happen and they want the organization to be remembered for this in the future.

Lowell CDC has developed a core mission statement that reflects the needs that the Board of Directors recognizes currently exist in the community. There are issues of blight, equity, and safety that are exacerbated by the lack of commitment by private landlords to reinvest in the community and its residents. Addressing these needs is at the core of the Lowell CDC, and to do so, the organization will engage in a variety of roles. The Lowell CDC, in carrying out its mission, will:

- Lead
- Do
- Facilitate
- Catalyze
- Convene
- Create
- Engage

It is the belief of the Board that by carrying out its mission, the Lowell CDC will participate in the transformation of Lowell, into a community that:

- Promotes collaboration among its residents and organizations
- Enhances the quality of life of its residents
- Is vibrant in its diversity
- Has residents that are empowered and engaged
- Promotes equitable growth

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- Has safe and open public spaces for its residents to gather and children to play

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CORE VALUES

The Lowell CDC has a set of values for the organization that reflect its approach to working in and with their community and partners. As the organization grows and increases its sphere of influence, these values will provide a touchstone for the organization. The Board of Directors has identified 8 core values for Lowell CDC, which it will promote within the organization, build into organizational management approaches, and expect staff and Board members to reflect.

Accountability – the Lowell CDC will be accountable to its community and partners, and will promote an environment where the highest ethical standards are expected.

Core Values are the fundamental values or ideals at the heart of the organization. They articulate ideals that the organization aspires to hold itself accountable for and offer guidance about how the organization behaves in carrying out its mission. It answers the question "What do we believe in?"

Advocacy – the Lowell CDC will represent its community and their needs and act as an advocate at every opportunity.

Collaboration - the Lowell CDC will work with the community, funders and partners to further its mission and the goals of the community. the Lowell CDC will lead by example, and will provide leadership where needed and support community leadership where it exists.

Community – the Lowell CDC recognizes that this work will require the efforts of many, and will promote a sense of community within its organization, with its partners and within the areas it serves. Lowell CDC will value these relationships and be inclusive in its efforts.

Diversity – the Lowell CDC commits to promoting and valuing the many diversities in its community, including ethnic, racial and economic.

Innovation – the Lowell CDC recognizes that new solutions and lasting change can be found in both traditional approaches and new approaches. We will value being flexible and resourceful to meet our goals.

Making a Difference – the Lowell CDC will measure its work by its ability to make a difference in the lives of its community.

Well-Being – the Lowell CDC believes that a stable community that provides for the safety and health of its residents is a critical component of the future of Central Fresno.

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THE ENVIRONMENT

The following is a brief summary of opportunities, threats, strengths and weaknesses highlighted by the board of Lowell CDC.

*An **environmental scan**, is a process for discovering and documenting facts and trends in the operating environment of an organization that are likely to affect the organization in its future work. It is often put in the framework of a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. **Strengths** are internal characteristics, qualities, and capacities that are doing well and are part of the reason the organization's accomplishments. **Weaknesses** are internal qualities that need to be improved. **Opportunities** refer to external activities or trends that the organization may benefit from, connect with or take advantage of to grow or enhance its performance. **Threats** are external activities or trends that threaten the current and future success of the*

Strengths – The Lowell CDC is a credible, connected and increasingly diverse organization that is using a community-based model recognized for its successes in Fresno.

This statement represents a recognition that the collaborative nature of the Board and their commitment to remaining connected to the community is a key strength of the organization and its opportunities for growth.

The increasing diversity of the Board members and their grass roots approach to engaging the community and partners is a further asset, and lends credibility to the efforts of the organization. The partnerships and connections represented by the work with the Tenant Education (“T.E.”), Dickey Park shade structure and the strengthened relationship with the Lowell Neighborhood Association are indicative of this growth.

Finally, the Board’s recognition of the need to create a sustainable organization and identity opportunities that are attainable and explainable will provide a balance against which to weigh priorities and opportunities.

Weaknesses – The Lowell CDC is a growing organization that needs to increase capacity to access funds and find ways to engage the entire neighborhood

This statement represents a recognition that as a young and growing organization, the Lowell CDC has internal infrastructure needs that it must address to continue to grow and meet its mission. Primary among these needs is to increase staffing and to maximize and leverage existing funding and assets to provide for future financial stability. This lack of infrastructure also impacts the ability to the organization to continue to grow as new opportunities are identified, as the current staffing and funding do not provide for the flexibility to add new initiatives without identifying human and capital resources to carry them out.

While the Lowell CDC values and promotes the diversity of the community, the current inability to fully engage residents in

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their own languages, and to ensure a safe space for collaboration for those with documentation concerns current limits the ability of the organization to fully engage all the community.

Opportunities – Local partners and new relationships may provide mutually beneficial opportunities that allow Lowell CDC to increase capacity and build relationships.

While the organization is continuing to grow, the need in the community is apparent, and the initial venture of the agency into the housing arena through the Calaveras project has increased the visibility and credibility of the organization. This initial opportunity has resulted in the organization garnering financial and other resources, and early support from key partners, including the City and County of Fresno Housing Authority and the City, which it has continued to expand upon and leverage.

Threats – Without strong City and neighborhood engagement, revitalization could create a competitive environment where existing organizations and residents are pushed out.

The current situation in Lowell is a paradox, representing a community on the verge of a shift. While there remains substantial housing and other deficits within the neighborhood, its appeal as a downtown neighborhood is attracting new residents with their own set of priorities for their new neighborhood. It will be important for the Lowell CDC to engage these new residents as they arrive to encourage their participation in the larger Lowell vision. Simultaneously, Lowell CDC will need to work with the City and other partners to actively work to minimize displacement of existing community members that can come with urban revitalization. To do so, it will be important for the Lowell CDC to position itself so as not to be pushed out by future competition from private developers.

STRATEGIC DIRECTION

As a growing organization, the Lowell CDC has determined that it will focus on areas that will support its dual goals of increasing its organizational capacity and meeting the needs of the Lowell community.

The strategic direction is a succinct statement about the strategy or approach an organization will take toward its work over a specific period of time. The statement is based on a combination of both the current environment (the opportunities and threats facing the organization) and the mission and competencies of the organization. It is often a direct response to the strategic questions asked by an organization, and should reflect the priorities of the organization.

The strategic direction and goals included in this plan are a response to its understanding of the critical needs of the community, and current opportunities and challenges for offering a strategic and coordinated response that will increase the quality of life and opportunities for those living in Lowell.

The three-year period of this Plan will be a time of assessing and building the Lowell CDC's capacity to meet these needs. Concurrently, Lowell CDC will continue to increase its visibility in the community, taking a leadership role in working with a broader array of community resources, and it will explore opportunities to collaborate with community partners.

Building the Brand within the Community – Listen & Do	The Listen	The Do
Create T.E. program that includes financial literacy, rights & responsibilities – provide in English, Spanish & Hmong		√
Calaveras Project		√
Community Asset-based surveying/ mapping with residents	√	
Get better understanding of what the residents really want	√	
Develop plan to translate materials into Spanish & Hmong		√
Database system/Rent Right Program		√
Overall outreach plan to engage all parts of the community	√	
Tenant Education (“T.E.”)		√
Multifamily inspection program		√
Fall Fest and other events		√
Shade structure		√

Build the Brand with Potential Partners & Funders

Create partnerships with Reading & Beyond and Lowell Elementary to reinforce linkages to neighborhood families

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Recruit and engage Higher Education partners
Create a T.E. Partners List
Community Regional Medical Center
Housing Authority
Work with CitiBank (RLEI program) for a responsible landlords program
Participate in the Fresno CDC Cohort
Strengthen relationships with faith based organizations
Private investors and landlords – (good actors list)
Hands on California

Build Financial Base & Infrastructure	Financial Capital	Human Capital	Infrastructure
Have a Spanish-speaking component of the CDC structure (ad-hoc? / advisory?) Role of Union de Familias		√	
Develop plan to update and translate organizational documents, including bylaws		√	√
Map out funding needs of the organization	√		

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Housing Development Committee to identify options for use of developer fee funds			√
Increase paid staff		√	
Create ongoing revenue stream	√		
Annual Report / Sales Pitch			√
Develop intern process		√	

ORGANIZATIONAL GOALS

To pursue the strategic direction described above, Lowell CDC will fulfill the following goals and objectives.

Goals and objectives set out the broad results that the organization hopes to achieve within a specific time period (goals) and statements of shorter term results and collections of activities (objectives) which if achieved will constitute and achievement of the goals.

Category	Strategy	Action
Building the Brand- Within the Community	Engage with the Community	Develop plan to translate materials into Spanish and Hmong
	Engage with the Community	Get better understanding of what residents really want – develop and carry out community asset-based surveying/mapping with residents
	Engage with the Community	Create and adopt overall outreach plan to engage all parts of the community
	Engage with the Community	Advocate for and carry out Fall Fest and other events through alignment with community based organizations
	Carry out community-based programs	Create T.E. program that includes financial literacy, rights & responsibilities – provide in English, Spanish and Hmong
	Carry out community-based programs	Continue role in development and launch at Calaveras Project
	Carry out community-based programs	Rent Right
	Carry out community-based programs	T.E.
	Carry out community-based programs	Multifamily Inspection program- Advocacy roll <i>Read: Evicted</i> <i>Fresno is not included in Metro Housing Survey</i>
	Carry out community-based programs	Shade structure- Dickey Park
Category	Strategy	Action

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Building the Brand – Potential Funders/ Partners	Collaborate with aligned organizations	Connect to Reading & Beyond to recruit board members, conduct T.E., and train representatives for T.E.
	Collaborate with aligned organizations	Collaborate with Lowell Elementary to recruit board members, conduct T.E., train representatives for T.E., and recruit
	Collaborate with aligned organizations	Conduct outreach to other aligned nonprofits (includes On Ramps and other faith based organizations, YFC, Hands on California, Cultiva la Salud) to recruit board members, conduct T.E., partner on community events, and research
	Engage with commercial partners	Develop marketing / alignment pitch & specific asks for types of partners
	Collaborate with aligned organizations	Develop list of T.E. partners
	Engage with potential partners	Develop strategy and engage higher education partners related to T.E. on campus and research partnerships with faculty.
	Engage with potential partners	Community Regional Medical Center Data: Health and Housing, Employment and job development, Funding. Recruit board members
	Collaborate with aligned organizations	CDC Cohort Partnerships for T.E., Tenant Leaders, Grant opportunities for combined work. Build capacity for other CDCs
Category	Strategy	Action
	Engage with potential partners	CitiBank (RLEI program) responsible landlord Engagement program
	Engage with potential partners	Housing Authority for Board Participation, Capacity Building through partnerships and development

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	Engage with commercial partners	(Develop list of) Private investor and landlords good actors list. Connect with owners through Rent Right.
Building the Financial Base & Infrastructure	Develop Funding Strategy	Map out funding needs of organization
	Develop Funding Strategy	Create ongoing revenue stream through Rent Right and Real-estate
	Develop Funding Strategy	Housing Development Committee to identify options for use of developer fee funding
	Leverage human capital resources	Have a Spanish-speaking component of Lowell CDC structure (ad-hoc/advisory?) Role of Union de Familias
	Leverage human capital resources	Increase paid staff
	Leverage human capital resources	Develop intern process
	Strengthen organizational infrastructure	Update and translate organizational documents (Spanish/Hmong), including bylaws
	Strengthen organizational infrastructure	Create and produce Annual Report / Sales Pitch

STRATEGIC ACTION PLAN

The Action Plan will take the goals and objectives and make them ACTIONABLE. It will specify the tactics that will be used to achieve them, when they will occur and who will be responsible.

2016	Q3 (July-September)	Q4 (October-December)
	T.E. Program Create T.E. program that includes rights & responsibilities	T.E. Program Pilot T.E. program
	T.E. Program Develop list/database of T.E. partners	T.E. Program Create materials for Train the Trainer
	Community Engagement Work with CBOs to identify potential tenant leaders	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders Community Engagement Create overall outreach plan to engage all parts of the community
	Housing Development (Ongoing) Calaveras Project	Housing Development (Ongoing) Calaveras Project
	Community Activity Advocate (with other CBOs) for Fall Fest with City Community Activity (Ongoing) Carry out Shade Structure project	Community Activity Have Fall Fest / Other Activity Community Engagement Create a Spanish-speaking component of the CDC structure (ad-hoc/advisory?)

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2017	Q1 (January-March)	Q2 (April-June)	Q3 (July-September)	Q4 (October-December)
	T.E. Program Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners
	T.E. Program Translate T.E. materials into Spanish and Hmong	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders Community Engagement Identify potential new Board members through outreach to CBOs	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> new Board members Community Engagement Maintain list of aligned CBOs and activities, review semi-annually	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> new Board members Community Engagement Develop and implement plan to maximize University Relationships
	Community Engagement Develop and carry out community asset-based surveying/mapping with residents	Community Engagement (Ongoing) Develop and carry out community asset-based surveying/mapping with residents	Community Engagement Implement strategy based on community asset-based survey	Community Engagement (Ongoing) Implement strategy based on community asset-based survey
	Housing Development (Ongoing) Calaveras Project Housing Development	Housing Development (Ongoing) <ul style="list-style-type: none"> ● Calaveras Project ● Identify and develop new housing development project 	Housing Development (Ongoing) <ul style="list-style-type: none"> ● Calaveras Project ● Identify and develop new housing development project 	Housing Development (Ongoing) <ul style="list-style-type: none"> ● Calaveras Project ● Identify and develop new housing development project

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Identify and develop new housing development project		Housing Development Advocate for and research ways to incentivize positive Landlord/Tenant interaction	<ul style="list-style-type: none"> Advocate for and research ways to incentivize positive Landlord/Tenant interaction
Develop Human Capital Plan, including: <ul style="list-style-type: none"> Plan to increase paid staff Develop intern process, including education component Identify Board needs 	Develop Funding Plan, including: <ul style="list-style-type: none"> Map funding needs of CDC Housing Development Committee recommends use of developer fee funding Identify opportunities to create ongoing revenue stream 	Board Committee to update and arrange translation of organizational documents, including bylaws	Create and produce Annual Report / Sales Pitch; Review and update Annual Plan

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2018	Q1 (January-March)	Q2 (April-June)	Q3 (July-September)	Q4 (October-December)
	T.E. Program (Ongoing) Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners	T.E. Program (Ongoing) Conduct T.E. with CBO partners
	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> Develop and implement plan to maximize University Relationships	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> new Board members Community Engagement Maintain list of aligned CBOs and activities, review semi-annually	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> new Board members	Community Engagement (Ongoing) Work with CBOs to identify potential tenant leaders <u>AND</u> new Board members Community Engagement Maintain list of aligned CBOs and activities, review semi-annually
	Community Engagement (Ongoing) Implement strategy based on community asset-based survey	Community Engagement (Ongoing) Implement strategy based on community asset-based survey	Community Engagement (Ongoing) Assess and updated strategy based on community asset-based survey	Community Engagement (Ongoing) Implement strategy based on community asset-based survey
	Housing Development (Ongoing)	Housing Development (Ongoing)	Housing Development (Ongoing)	Housing Development (Ongoing)

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	<ul style="list-style-type: none"> ● Identify and develop new housing development project ● Advocate for and research ways to incentivize positive Landlord/Tenant interaction 	<ul style="list-style-type: none"> ● Identify and develop new housing development project ● Advocate for and research ways to incentivize positive Landlord/Tenant interaction 	<ul style="list-style-type: none"> ● Identify and develop new housing development project ● Advocate for and research ways to incentivize positive Landlord/Tenant interaction 	<ul style="list-style-type: none"> ● Identify and develop new housing development project ● Advocate for and research ways to incentivize positive Landlord/Tenant interaction
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